TBI

Television Business International

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2017:
The big stories from last year
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KIRI
FROM MULTI-AWARD WINNING WRITER
JACK THORNE
STARRING SARAH LANCASHIRE

drama that captivates

from talent that resonates

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EDITOR'S NOTE

JESSE WHITTOCK

There's no doubt that 2017 was a hell of a year, both for the industry and globally. Pretty much all bets are off, as events continue to dumbfound pollsters, commentators and analysts the world round, and TV evolves ever faster.

Politically, 2017 was the year the UK gingerly began negotiating its exit from the European Union and Donald Trump's USA lurched from one crisis to another.

For TBI, there were changes too. We welcomed Kaltrina Bylykbashi as our new deputy ed and named a new editor – me (complaints not welcome). Crucially, we also revamped the TBIVision.com website with a stronger, more modern design that's responsive to whatever platform you're using. We hope it's serving you well.

For television, the changes in 2017 were far reaching, with many of the implications not yet clear. For one thing, we've seen emergence of my favourite new acronym, FAANG (Facebook, Apple, Amazon, Netflix and Google), a group of tech giants who are shaking up TV and content ownership like never before.

That threat has created a race to scale among the incumbents. AT&T is desperately trying to push through its takeover of Time Warner, while The Walt Disney Company changed the face of Hollywood by acquiring most of Rupert Murdoch's entertainment assets. *Nobody* saw that coming.

With so much to think about, we've selected the top ten stories of 2017 as the centrepoint of this first issue of TBI magazine for 2018. Did we choose the right ones? Let us know on social media.

We also hear from Christina Jennings from Shaftesbury Films and Endemol Shine International CEO Cathy Payne, who were winners at our Content Innovation Awards in October.

Elsewhere, Turner EMEA president Giorgio Stock offers up his thoughts in an exclusive interview; we hear from the likes of Charlie Brooker, Geoffrey Wright, David Mitchell and Robert Webb; and investigate everything from casting, Latin American formats and Scandinavia's next wave of original dramas.

That's plenty of food for thought for now, and you can confidently say this year will be every bit as eventful as the one we've just had.

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What's on?

For the creators, executives and viewers of tomorrow, time will be the most valuable commodity and also the biggest variable. So what are our industry's innovators and thought leaders placing their bets on for the next five years?

Who's in?

Avi Nir
CEO
Keshet Media Group

Casey Bloys
President HBO programming
HBO

Darren Throop
CEO
Entertainment One

David Levine
Co-Head of Drama
HBO

David Nevins
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CBS News

Eleonora Andreatta
CCO Rai Fiction unit
Rai

Francesca Orsi
EVP & Co-Head
HBO Drama Series

Gary Newman
Chairman & CEO
Fox Television Group

Joel Stillerman
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Hulu

Kevin Reilly
President TBS and TNT, CCO
Turner

Marie Guillaumond
Head of French Drama
TF1

Mark Gordon
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Rick Rosen
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WME

THE CROWN

Suzanne Mackie
Benjamin Caron
Andy Harries
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No Payne, no gain

Cathy Payne was the first winner of the Content Innovation Awards' Content Leader of the Year award in October last year. The Endemol Shine International CEO tells Jesse Whittock about her philosophy towards selling programming in the modern era and how distribution is getting creative

Cathy Payne's career has been on an upward trajectory for two decades, but it was back in 2000 that she saw her future in international TV sales when, working at Australian distributor Southern Star International, she was instrumental in the £40 million (US$54 million) deal that saw Aussie soap *Home and Away* switch from ITV to Channel 5.

"*Home and Away* was a game-changer for me, because it made me really believe in myself," she recalls. "When I did get it over the line, a key person in the deal said to me I should always remember it was because of the work I did and the insight I had that got it done."

Since then Payne has risen to the top of the international distribution business. She was CEO of Southern Star International before it merged with Endemol's distribution division in 2009, and then became boss of Endemol Worldwide Distribution. Then, following the merger of Endemol and Shine Group at the end of 2014, she beat off competition from Nadine Nohr to become chief executive of Endemol Shine International.

In October last year, Payne was named the inaugural winner of TBI and Digital TV Europe's Content Leader of the Year prize at the Content Innovation Awards, solidifying her reputation as a key player in TV sales.

Reflecting on her gong, which she accepted in front of more than 200 industry execs in Cannes, Payne says: "I don't think anyone wants to be the centre of attention, but it was nice to be recognised for what you've done in your career. Sometimes it does feel like distribution is considered just the commercial part of the business, and not a creative part of the business, but you have to be creative to sell shows."

Many – including the exec herself – describe Payne as a tough but fair negotiator, with a flexible approach to deal making.

"TV sales is not a cookie-cutter business," she says. "I do say to producers that if they're not comfortable working with us I'd rather they didn't, because it is a long relationship that will have ups and downs, good times and bad times, and you have got to roll with the punches. It has to be about trust and taking each other's views into account. If there is one thing people say about me is it is I'm professional."

Payne's knowledge of the industry comes from a career that has seen her move from Australia to the UK, and from a market-focused distribution approach to one that is now year-round and often far more bespoke.

"The one thing you can do as a distributor is allow people to view the show in an ideal environment," she says. "We will always have trade markets, but bespoke activities with buyers in their home territories are very important."

This will differ market to market – when ESI screened Channel 4 drama *Humans* in France it was to a room of rival buyers, while in the US each network wanted a separate viewing (AMC ultimately became coproducer on the sci-fi series). Ultimately, "Nothing beats a few hours with a buyer face to face in their home market", says Payne.

This flexible approach helped ESI sell Kit Harington's big budget BBC drama *Gunpowder* to US cable network HBO, though unscripted shows such as *Big Brother*, *MasterChef* and *Hunted* remain core to business.

Payne has publicly stated her ambition to install ESI as the number one non-studio distributor on the international market, and it can be argued that has been achieved (though the likes of FremantleMedia and the BBC, which recently merged its studio and commercials arms, may beg to differ). Speaking to TBI, she takes a diplomatic tone: "We're certainly one of the big ones out there."

Reaching that scale was difficult, and Payne describes the early days after the Endemol-Shine merger as "tough" and "complicated", with two distribution outfits with different approaches needing to quickly come together as one, and a sensitive approach required for those exiting as a result. "Some people might have been disappointed, but it was done fairly, and those who left were properly looked after," says Payne.

Among other accomplishments in her career, Payne and her new team were able to achieve their financial goals that year, but ever the professional, Payne says it was immediately back to the grindstone the following year. "As a good sales person knows, you get to that end of year goal, you have the holidays and then a new year starts," she adds. "New year, new budget, new target." **TBI**

Christina Jennings: A lifetime in TV

As Canada's most well-known indie producer, Shaftesbury Films' Christina Jennings knows how to put a production deal together. The winner of TBI's inaugural Content Innovation Awards Lifetime Achievement gong tells Jesse Whittock about her career and how funding is changing

When Christina Jennings founded Toronto-based indie Shaftesbury Films in 1987, she wouldn't have known she'd become Canada's most prolific television producer.

Shaftesbury's detective period drama *Murdoch Mysteries* is now on its eleventh season (firstly for City and later pubcaster CBC) and has sold internationally, while newer series such as *Slasher* have taken the company into business with Netflix. On the digital front, investments in subsidiary Smokebomb Entertainment have led to the creation of popular short-form web drama *Carmilla*, which has become a feature film and is headed for a primetime TV remake too.

Having previously received accolades from Canadian trade titles including Producer of the Decade, it should not have been a surprise when she was named TBI and Digital TV Europe's Lifetime Achievement Award winner at our third Content Innovation Awards in October last year.

TBI: how do you assess where the Shaftesbury business is right now?

Christina Jennings: Twenty-seventeen was a pretty great year. We produced three primetime series and a couple of feature films, including *Carmilla*. We were able to shoot more digital scripted series, which are a terrific way to get scripted IP on its feet. On the branded side our biggest success was *Upstairs Amy*, Walmart's first scripted series. It was very much like what we do in the digital space – focusing on female, millennial audiences.

TBI: With various parts to your business, how do you divide up your time?

CJ: The business that we still all know and the business driving revenues is television – there is no question about that. The lion's share of my time therefore goes on series we have up and running and getting new series away in a challenging market.

The other part of my world is in the branded space, and finding new revenue models – it's very exciting to get brands to fund scripted content. That's a new financing model. *Carmilla* is the best example, as it was fully financed by brands. It's got a book deal and feature film, and now we're in primetime development for a TV series, and that's all of the back of a brand. We're in the early days of this – not us just, but everyone.

TBI: How do you keep a business like Shaftesbury evolving and profitable?

CJ: You need to have a diversified portfolio. In the context of financing, that means some shows are going to be created traditionally, where you get a licence fee from a broadcaster, you attract some soft money from Canadian media funds, you add some tax credits to that and go out and get an international distributor. *Frankie Drake Mysteries* and *Murdoch Mysteries* are traditionally funded in Canada.

Then you've got the Netflix model, which is what we used for *Slasher*. Netflix funds most of it, and we've done some separate territory deals in the UK and Germany outside of that agreement. We, as the producer, are also bringing our tax credits to the table, in this case through a French-Canadian broadcaster, and we added in a sales agent, Kew Media Distribution.

We're also going to announce a project in development with a US cable network that will be 100% financed by them. They will have all exploitation rights, though it is our IP, which we are developing with them. It's not a service deal – the key difference is we created the idea and IP.

TBI: What advice would you give to an indie producer starting out today?

CJ: Younger companies should not be fearful of new models – be prepared to think out of the box and think of partnerships in different ways. The first film this company ever did was a coproduction with a UK company, and we're still doing them. We've expanded that now to New Zealand and are looking at Canada-France coproductions too. It's also worth remembering coproduction is about making sure your creative is solid and that you don't end up wasting time with no creative leader. Otherwise you end up with a hotchpotch.

TBI: How helpful is a returning primetime drama series like *Murdoch Mysteries?*

CJ: It's what everybody looks to find. Getting one takes a lot of work, but if you find it, the audience comes and doesn't diminish – younger audiences are finding *Murdoch*, and it's still working around the world.

The primetime business, certainly in our case, allows us to do other things like *Slasher* and to take the risks we're taking on digital. Without it, you need a big pot of money from someone like a venture capitalist, which we've avoided. All our experiments have used our own cash, which is great.

TBI: Would you consider selling Shaftesbury?

CJ: We have some outside shareholders, but management owns the majority. Selling is of interest in theory, but you have to find the right partner, just like you have to find the right coproduction partners. It's tricky, because you've got to know that it isn't 1+1=2, but has to add up to more than that.

One of the idiosyncrasies in Canada is that there are very strong rules around local content – foreign buyers cannot buy control of a Canadian company. The minute that happens it is deemed to be a foreign company. In the UK, where you don't have the same support mechanism, an American could buy you, but they could not buy controlling interests in Canada. You tend to acquire companies to build the bottom line, so if you can't control that you lose the value of a Canadian producer.

Murdoch Mysteries

If we look forwards to the next few years, there's no question Shaftesbury could partner up with someone who could add some value. Who that is, I haven't got a clue.

TBI: is the industry better for women than when you began in the business?

CJ: I started 30 years ago, and it's now better, certainly behind the camera, which is fantastic. However, an interesting observation is that I would bet around the world the majority of broadcast executives are actually women, but if you're looking at the head honchos, they're not women. The women are doing a lot of the programming work.

Geena Davis uses that old saying: 'If you see it, you can be it'. I like that. If you're a young female producer coming into the industry, you can see me running a company and feel you can also do it. If I can have a business and family, so can you. Role models are crucial, but it's definitely a better place overall now.

TBI: Are you concerned about potential regulatory changes to the Canadian media production sector?

CJ: My great fear is if our regulations are relaxed in any way, in a time when it's getting harder to make content and to find audiences with so many companies and platforms out there, Canadian stories might find themselves pushed off to the side.

TBI: There was a lot of surprise over the content quota-for-tax deal the Canadian government did with Netflix. What has the response been?

CJ: It's not quite a level playing field – it's very odd to regulate Canadian broadcasters in one way and not to do the same with others. That has to be the biggest thing government deals with in 2018. The world has changed, and we now have to ask how we can sustain the industry, and how we make sure our individual cultures are protected. **TBI**

2017's key moments

In many ways, 2017 was landmark year for television and the wider world, with significant changes, good and bad, in both spheres. Here, TBI runs down ten stories that defined the past twelve months.

#10 Movers and shakers

The big trend last year was the exodus of television executives to lead commissioning teams for the emerging digital giants.

With Apple's move into the industry this year, it is unsurprising that some of TBIVision.com's most popular stories have been about who the tech giant has hired to support its venture. Jay Hunt's move to become European creative director of worldwide video was perhaps the biggest surprise.

Hunt (left), the former Channel 4 chief creative officer, will now commission original content for the company from Europe, having previously been linked with a move to Netflix.

Hunt will be working under former Sony bosses Jamie Erlicht and Zack Van Amburg, who shocked Hollywood by joining Apple to oversee all aspects of video programming.

For Amazon Studios, Georgia Brown (right) moving from FremantleMedia International made waves, as she became European originals chief. She joins former Fox Networks Group exec Sharon Tal Yguado, who moved in January and is running scripted, and Heather Schuster, now in charge of unscripted.

Over at Fox cousin Sky, Nicola Bamford moved to another affiliated company, Endemol Shine Group, to become CEO of international operations as Martha Brass departed.

Warner Bros. Television Production UK experienced major transition, as it saw top bosses, Claire Hungate and Nick Emmerson (right), depart. The duo had run Shed Media.

Meanwhile, NBCUniversal International found a replacement for its managing director for the UK and emerging markets, Colin McLeod. Marketing chief Lee Raftery now holds the position, with Jeff Wachtel relocating to London to become the new international production chief following the planned exit of Michael Edelstein.

Of course there were those that began their own ventures. Warner Bros. Emmerson launched production house Koska with ITV Studios.

Also heading in ITV's direction was DR drama chief Piv Bernth and her number two, Lars Hermann, who launched a new prodco, Apple Tree Productions. They went into business with the broadcaster, expanding its European production capabilties.

Demanding more results #9

TBI's work with Parrot Analytics has revealed some of the most popular original programmes watched in Europe this year.

Coming up top in our exclusive data, Amazon Prime Video's unscripted series *The Grand Tour* repeatedly reached the highest demand in the region for digitally-produced originals, beating Netflix shows *13 Reason's Why* and *Orange is the New Black*.

The series is currently driving four demand expressions for every 100 made across the region, ahead of the 3.6 from *13 Reasons Why* and the 2.7 from *Orange is the New Black*.

When combining the range of stats our top ten lists provided this year, the top five most mentioned digital originals (those appearing on the charts) are *Orange is the New Black*, which appeared 26 times, *Stranger Things*, which appeared 25 times, *House of Cards* (24), *Black Mirror* and *13 Reasons Why* (both 21).

While shows like *Black Mirror* have rarely appeared to generate enough demand expressions to get to the top spot, they provide a recurring popularity which viewers come back to time and again.

When it comes to the overall most viewed shows, *The Walking Dead* appeared in 25 top tens, *Game of Thrones* in 24, *Pretty Little Liars* was in 20, *The Big Bang Theory* in 12 and *Vikings* in 11.

The Grand Tour

Ratings-wise, *Game of Thrones* became HBO's biggest ever series in 2017, with episodes reaching more than 30 million viewers using combined metrics, while a number of perceived plot missteps saw AMC zombie drama juggernaut *The Walking Dead* drop to its lowest ebb in five years (it still remains basic cable's biggest show).

#8 Endemol Shine's rollercoaster ride

A number of the most read stories of the year on TBIVision.com focused on Sophie Turner Laing's Endemol Shine Group. One was the closure of the 20-year-old UK prodco Princess Productions, which shuttered after its key production, *The Wright Stuff*, was put out to tender.

The news, which emerged in May, followed a period of management upheaval after co-managing director Conor Baily departed in 2016 followed by remaining MD Emma Hardy later in February.

Endemol Shine Turkey also filed for insolvency in July, in a story that took a surprisingly public profile. The move came after Endemol Shine Group fired Endemol Shine Turkey bosses Hakan Eren and Gokan Tatrer after "serious" management issues were discovered. The execs have countersued and the situation remains in flux.

Elsewhere, Endemol Shine India's managing director and CEO Deepak Dhar handed in his notice after eleven years in the business. Asia chief Fotini Paraskakis and Northern Europe boss Marcus Wolter are also leaving the production and distribution giant, which remains arguably the world's most influential indie.


Fotini Paraskakis


Emma Hardy


Sophie Turner Laing


Marcus Wolter

Content quotas in Europe #7


Netflix's *The Crown*

Despite the increasing investment in localised productions from Netflix and Amazon last year, EU chiefs were determined to impose quotas for the SVOD services hoping to operate in the area.

EU ministers formally agreed that there should be a minimum of a 30% quota on European works on on-demand providers established in the area. Initially, ministers had set this at 20%, but this was likely adjusted as Netflix had stated that it already fulfils that quota.

Amazon has more to answer for in terms of European content, but both providers have invested quite a bit more in localised programming as the year developed, with Amazon buying in its first French acquisitions such as *Le Sang de la Vigne*, *Candice Renoir* and *Witnesses* in December, having launched its first German original earlier in the year.

Netflix, which has made a much bigger investment in content in general, has invested in a range of originals in Benelux, Germany, France, Italy, Denmark, Spain and the UK.

While a formal quota is yet to be reached, it certainly seems that the major SVOD players would have no problem reaching the agreed level, though Netflix's tax deal with Canada shows just how little it likes having business dictated to its executives.


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Congratulations from CBC

#6 Rejiggery pokery

There were structural changes at companies ranging from Discovery Communications, UKTV and the BBC last year, as the TV business got ever more complex. In particular, European companies and departments saw reshuffles.

British channels group UKTV created five channel director posts to reflect a major increase in investment in original programming. Emma Ayech, Luke Hales, Gerald Casey, Adam Collings and Vicky Walker all gained promotions in the rejig, but Sally Quick exited and question marks were thrown up over the future of others.

Discovery changed the structure of its EMEA business after it named Susanna Dinnage (top) as global president for Animal Planet. The move saw Discovery consolidate business units that were previously split into the UK, Nordics, Southern Europe and what is calls 'CEEMEA'.

Easily one of the biggest moves of the year, UK pubcaster the BBC merged its production arm, BBC Studios, and commercial division, BBC Worldwide. Tim Davie (below) will lead the combined division, with Mark Linsey the production chief. Tom Fussell will be CFO and Anna Mallett COO.

The Corporation claims the move will bring it "into line with the rest of the industry in an increasingly competitive and global market for production and distribution".

Essentially, the BBC, whose production division became a commercial entity in April, claims it is following the same model of companies such as Endemol Shine Group, All3Media, Fremantle, Banijay and ITV Studios. Indie reaction has been mixed, at best.

Fremantle and Warner Bros. both also restructured their UK arms. Warner Bros. placed its Britain-based prodcos in its international production division under Ronald Goes after Nick Emmerson and Claire Hungate left, while Fremantle rejigged its unscripted division, bringing its UK prodcos Talkback and Thames back together as Channel 4's Liam Humphreys took over the division as CEO.

#5 In remembrance

A number of well-known faces from the international TV business passed away last year, leaving friends, family and colleagues behind.

There was a significant outpouring of grief over the passing of Proper Television president Guy O'Sullivan, who launched the Canadian company in 2004 after moving from the UK.

O'Sullivan has success with formats such as CTV's *MasterChef Canada* and original series *Vegas Road Rats*, and his unexpected death was a sad moment for factual and format television.

Minos Kyriakou, who founded Antenna TV in 1989 and formally launched Antenna Group a decade later, passed away in July, before the much-loved former Fox, National Geographic and FremantleMedia North America chief David Lyle died in September. The executive, known for a wry sense of humour and sharp intellect, succumbed after a fight with cancer.

In the same week, colleagues were also paying respects to former SVT programming chief Annie Wegelius, who succumbed to breast cancer. Wegelius had a long career spanning four decades in both Swedish and international television, and truly embodied the international TV exec.

Then in October, former Optomen Television chief Patricia Llewellyn passed at age 55. Llewellyn is credited for being the executive behind now-famous Jamie Oliver and Gordon Ramsay, with both citing her as key influences in their careers.


David Lyle


Annie Wegelius


Patricia Llewellyn


Guy O'Sullivan

#4

Social looks to originals

Twenty-seventeen was marked by tech and social companies all attempting to take a piece of the content pie by creating original programming for their platforms. Netflix, Amazon and Hulu have been pushing the agenda for half a decade, but last year saw Apple, Google, Snapchat, Facebook and, temporarily, even Vimeo join the mix.

Apple took the deepest plunge, hiring Sony Pictures Television's co-presidents Zack Van Amburg and Jamie Erlicht, and later Amazon international content chief Morgan Wandell and Jay Hunt, who surprised everyone after missing out on the CEO job at her previous firm, UK broadcaster Channel 4.

Zack Van Amburg and Jamie Erlicht

Apple commissioned its first two original scripted shows after taking rights to new episodes of *Carpool Karaoke* and launching *Planet of the Apps*. First was a remake of Steven Spielberg's anthology series *Amazing Stories*, and next was an big-budget unnamed comedy created and fronted by Jennifer Aniston and Reese Witherspoon.

Facebook also moved into originals, launching a new platform in the US, Facebook Watch, to host episodic programmes. The social media service is currently playing host to original programmes such as Tastemade's *Little Kitchen* and *Bae or Bail* from A&E Networks, but aims to become home to a wide range of shows, including in reality, comedy and live sports, with Facebook funding some of these to "help inspire creators and seed the ecosystem". Expect Watch to go global this year.

Snapchat also made moves to keep up with the competition by teaming up with TV giant NBCUniversal to create a digital content studio in California that looks to build original telly-style shows on the platform. Original videos will appear in the 'Shows' tab of the popular app and be around three to five minutes long. Snap has already had some success with its unique version of *The Voice US*, specifically created for the app.

Less successfully, Vimeo launched an originals plan last year that ultimately lasted just two months. Initially claiming that it would "follow in the footsteps of Netflix", Vimeo hired and then fired Paramount Pictures' Alana Mayo and Kesila Childers from Bunim Murray Productions as it rallied back on its strategy, claiming the opportunity to "empower creators is too large and too important for us to attack with anything other than absolute focus and clarity".

CHRIS BONNEY, CEO OF RIGHTS, CINEFLIX MEDIA

"At the moment, the sense of disruption to broadcasters from the SVODs is probably at its peak, but I believe a balance in the market will be found in the medium-to-long term, which will ensure the continued creation and distribution of top quality content."

THE CARRIAGE CLASH OF 2017

Discovery Channel VS sky

#3

Discovery and Sky engaged in a bitter carriage dispute in January 2017, keeping TBI readers hooked as the drama unfolded in public over whether the two companies could eventually reach a deal to keep networks such as Discovery Channel and Animal Planet on the Sky service service.

The dispute began with Sky claiming that Discovery demanded as much as £1 billion (US$1.3 billion) for its portfolio of channels in carriage talks. Discovery in turn refuted the statement, with the company claiming that Sky was making misleading and aggressive claims.

A swathe of public media statements were exchanged, which is rarely the way business in done in Europe. Yet neither was willing to back down from their demands or give an inch, with both claiming their affiliate partner was holding them – and by extension, their customers – to ransom.

At the last minute, the media giants managed to come to an agreement for an undetermined sum, which both sides claimed as a victory over the other.

Discovery has met with other carriage disputes this year, as it continues to press for better fees due its major investments in content. Towards the end of the year, Finnish pay TV operator DNA said that it could drop its channels after being refusing meet the factual content company's demand for higher distribution fees.

Over in the US, retransmission fees and carriage disputes are far more common, and December saw CBS networks such as Smithsonian Channel go dark on US satcaster Dish Network just before the holidays. It took three days for the companies to reach a multi-carriage deal for an undisclosed figure.

#2 The race to scale

Despite global economic uncertainty, M&A activity in television has been prolific. The news was largely dominated by Fox's plans to sell assets to The Walt Disney Company, Discovery Communications buying Scripps Networks Interactive, AT&T's Time Warner takeover and CBS's acquisition of Australia commercial broadcaster Ten Network

The US$66 billion deal that will see Disney snap up most of Fox's entertainment assets came as a huge shock – Rupert Murdoch as a seller!? – but makes sense in context. Traditional media companies need scale in their fight to continue to control content against the threat of tech content giants like Amazon, Apple and Facebook, who are investing heavily.

The deal is expected to close either late 2018 or 2019, just as Disney gears up to launch its 'Netflix killing' SVOD service.

US telco AT&T's deal for Time Warner, priced at well over US$80 billion, has gone through a rollercoaster. The agreement got shareholders approval and, as a vertical acquisition, looked solid, with AT&T chief Randall Stephenson saying that the merger was "moving along as expected".

It all came to a halt in November when the US Department for Justice filed a lawsuit to prevent the merger, claiming that is not the best move for consumers. AT&T, among others, rather pointed to US President Donald Trump as the main reason for the unexpected twist.

Trump is a vocal critic of Time Warner's CNN, and of the deal, appearing to go against his capitalist business sensibilities. It's also notable he immediately showed support for Disney-Fox, despite that horizontal deal creating a mega-studio in Hollywood and concentrating content down one stream. AT&T will head to court to push its deal through later this year.

Network Ten's struggles throughout 2017 became a fable in modern media economics. The broadcaster faced an uncertain future as News Corp owner Lachlan Murdoch, James Packer and WIN owner Bruce Gordon pulled financial support, leaving the network with no option but to slip into voluntary administration.

CBS has since closed a takeover deal with the broadcaster gaining the core Ten channel, cleverly transferring debts relating to a major content output deal into equity and then convincing administrators its plans were better for the business than those of Murdoch and Gordon, who had made their own takeover offer.

Many predict more major M&A deals will follow in 2018.

IRINA GOFMAN, PRESIDENT AND CEO, VIASAT WORLD

"I believe that M&As based on clear consolidation and/or expansion goals are still right for TV companies. For example, Discovery's acquisition of Scripps appears to have synergetic potential in the pay TV advertising market, with the two companies sharing a complimentary audience and content library."

ED BARTON, CHIEF ANALYST, OVUM

"With the proliferation of direct-to-consumer (D2C) distribution models over the next few years, these companies are positioning themselves to benefit by vertically integrating everything you need to configure multiple types of D2C services each customised for different budgets and viewing habits."

#1 Weinstein fallout

The Weinstein scandal caused shockwaves throughout the industry this year, leading to the dismissal of key figures within the business and further afield. The revelation served as watershed moment for victims of sexual harassment, which has been particularly prevalent in the entertainment industry.

Producer extraordinaire Harvey Weinstein was initially accused of sexual misconduct by a handful of actresses. This then turned into a full-blown exposé involving dozens of individuals, implicating a range of industry figures. New allegations continue daily.

Weinstein is currently being formally investigated by a range of legal departments both in the US and the UK (he denies all allegations of sexual assault and rape), and others are falling with him. One company in particular to have felt the pain is Amazon – an organisation that lost top programming executives.

Kicking off the downward spiral was Roy Price, who left his role as head of Amazon Studios after sexual harassment claims from *The Man in the High Castle* producer Isa Hackett. His team tumbled in the fallout, with head of international productions Morgan Wandell leaving for Apple, head of half hour and drama Joe Lewis seguing to a production deal and unscripted head Conrad Riggs also exiting (none of the three have been accused of sexual impropriety).

Many others have lost jobs and productions have halted due to allegations. Louie C.K., Ed Westwick, Kevin Spacey, Chris Savino and Jeffrey Tambor have all exited influential posts, and there is undoubtedly more to come. TV will never be the same in the post-Weinstein world. **TBI**

JANE ROOT, CEO, NUTOPIA

"The recent sexual harassment scandal has highlighted the true scale of the problem in our industry.

"Unfortunately, I'm sure that every woman in the industry will have a basement of crap of horrible encounters, suggestions, or worse. Sadly, we've all experienced it on some level.

"Those of us who are in positions of power – both women and men – must take the lead in instigating change.

We must all take pro-active steps in our own businesses to empower our staff to report instances of harassment without fear of judgement or repercussions.

"We must support women in their continued career progression and actively mentor the next generation of young women who are starting out in the industry and who are perhaps most vulnerable. They should not have to face the same challenges that we have done."

Stock trader

Turner EMEA continues to grow under Giorgio Stock, who is targeting consumers with investment in brands. He tells Jesse Whittock about his plans and working with sister firms HBO and Warner Bros.

TBI interviews Turner EMEA president Giorgio Stock on the same day his former employer, The Walt Disney Company, announces its US$54.2 billion takeover of 21st Century Fox's key entertainment assets.

Turner's parent, Time Warner, is itself involved in what could become one of the largest corporate takeover deals in history, with telecommunications giant AT&T headed to court later this year to push through a deal worth a total of nearly US$110 billion.

In the same week in December, Stock has announced Turner will be moving its London base to an all-singing, all-dancing office near Old Street in East London in 2019. At the current digs, Turner House near Soho in the centre of the city, he is summarising the recent spate of high level M&A action.

"It's a significant shift that we're seeing across the industry," he says. "There's consolidation and an attempt to go for scale. With AT&T, we offered the first sign that was the direction of where we were going and a number of others have followed that path. Disney-Fox will not be the last one."

For Turner, traditionally known as the channels business arm of Time Warner, the direction is also changing. "We dropped the Turner Broadcasting name, which might sound like a small thing, but it is actually a quite meaningful statement," he says.

Turner, owner of channel brands such as Cartoon Network, TNT and TBS, is now a company with a "fan-centric approach", says Stock. In part, this means offering core linear channels, many of which are set for strong results from 2017 ("We've had our best year ever at Turner by a mile, and the core business is still very much a driving force of that," says Stock).

However, being 'fan-centric' also means direct-to-consumer offers such as the Boomerang SVOD app, US movie service FilmStruck, video game platform Gloud and the kids-focused Toonix in Scandinavia.

The latter is a sign of how Time Warner's subsidiaries are working better together, having launched as a joint venture with on-demand service HBO Nordic. "It's a bespoke area on the app with a tremendous amount of Turner and Warner content, and local third party content such as *Pippi Longstocking*," says Stock.

This all comes back to IP ownership. Turner believes that by controlling rights, it can negotiate better deals with pay TV platform affiliates, invest more heavily to create stronger brands that attract licensing and merchandising business and other revenues streams, or go direct to market with product.

Stock says Turner's investment in content and marketing is at an all-time high, which is driving returns that have offset ratings and ad market dollars erosion in some territories. This is especially true of the kids space, whose young audience is most likely to bypass linear. Luckily, that same audience is also the most likely to drive L&M revenues.

In the general entertainment arena, Turner has traditionally been strong in Germany, where original shows such as *4 Blocks* are gaining traction. The company has also launched a Warner Bros. branded channel in

France, which Stock describes as "was a coming of age moment" for the sister companies.

"What's exciting about today compared with five years ago is our audiences are everywhere, and it's exciting to be there with them," he says. "It would be stupid to assume linear will be gone in a year or two, but we are also building our brands."

"What doesn't excite me is that the trading terms are still not resolved," he continues, pointing to the reality that assessing numbers of viewers, fans, consumers or anyone else interacting with content is still far from a science.

"The positive is we can see TV is one of several pillars we're already successfully leveraging," says Stock. "We have more than two billion YouTube views a year and a billion minutes a month. These are real quality touch points that I can measure and leverage for brand building purposes, but it is reductive to see these only as marketing tools.

"The value and monetisation that I am currently extracting from these points is not yet in line with what it should be – some people within this equation are making more revenue out of this than me."

He is frustrated with the regulation surrounding some of the influential tech giants, which are not classed as broadcasters and therefore not subject to the same scrutiny, but believes watchdogs will ultimately restore parity. "If I made some of the mistakes others have made, we don't just lose customers, but Ofcom calls and says we're going to lose our licence. I think it will change, but maybe not overnight."

However, Stock, who has been with Turner since 2013, believes his company, and the wider industry, is moving towards a better place. "It's been a long, hard year – all the winds we expected to blow in other directions blew those ways, economies haven't been exploding and some countries have decided to make their lives more difficult, but we stayed out course and audiences, advertisers and platforms have taken note," he says.

"The reason I want us to make so much progress is to make as much money as we can. When you have better profits you can invest more and your case for that investment is stronger too." **TBI**

Mind the casting gap

Master of None

Casting directors are evolving their methods to pick the right individuals to reflect society, but can they be fully representative if diversity isn't replicated behind-the-scenes? Kaltrina Bylykbashi reports

Casting has been of hot debate in recent years, particularly when it comes to incorporating more diversity. While improved inclusivity in casting is still a work in progress, there have been a host of successful new shows doing it well.

From NBC's *This is Us* and *The Good Place* to Paramount Network's *Heathers* and the groundbreaking *Master of None* from Netflix, lead roles have increasingly been taken by those of differing ethnicities, abilities and body sizes.

Beyond looking purely at scripted, big moves have also been made across unscripted television. From October Films' *Dangerous Borders: A Journey Across Indian & Pakistan*, which features British Asian journalists Babita Sharma and Adnan Sharwar, to *Jordanne*, a short documentary about a 22-year-old British wheelchair tennis player, the range of talent telling their diverse stories from their own perspective is widening.

This shift is largely due to the attitude of casting directors today. While in the past including characters of a different race would have been seen as a 'box ticking exercise', leading to tokenism and stereotyped figures appearing on- screen, casting directors describe a much more holistic experience in the way that they cast today.

Charlie Pheby, unscripted casting director for October Films in the UK and US, tells TBI: "It's now so much part of the fabric that you don't think about casting diversly as an added extra.

"If you start looking at it as a separate body that's when it becomes a problem, because that means you've got two jobs to do – if you're doing outreach for people in a hair salon, you shouldn't be looking at Afro-Carribean salons as an added extra. It should be viewed as a single task."

Andy Pryor, the casting director that was partly responsible in making Jodi Whittaker the latest *Dr. Who* – perhaps the biggest disruptive casting decision of the year – agrees with Pheby's sentiment.

"The vast majority of casting directors have engaged with this issue pretty soundly – particularly in the last two or three years.

"It's becoming second nature that you look at what you can do to keep a cast interesting. A lot of writers are also getting better that writing diversly and not just leaving it to us to populate these roles. There's a real awareness that it's not about tokenism."

However, despite the efforts to find the right people, it isn't always so easy. Both directors refer to institutionalised gaps that often make it difficult to incorporate a variety of people in roles, even if they wanted to.

For example, Pryor comments that there is a natural imbalance in the acting community because becoming an actor can be difficult and expensive. This gives him a naturally smaller pool of individuals to pick from.

Another example of imbalance is the lack of diverse writing talent and behind-the-scenes crew. Pheby argues that off-screen diversity is the key starting point to gaining truly representative TV.

"Actually allowing people with different voices to make television will only get it replicated on screen, he says.

"If you've got people with different interests coming to the industry talking about things that are important to them, it will really make a change."

Pryor also believes that getting more diverse talent behind the screen is the one area that television has some way to go to achieve.

This is backed by a range of studies that show a lack of diversity in the writing room in particular. A recent report from US racial justice organisation Color of Change showed just 4.8% of TV writers in the territory are black, for example. No equivalent is available in the UK.

However, there is value in bringing in more diverse crew. Issa Rae's comedy *Insecure* is the embodiment of how a black writer can produce TV that tells a representative story while also remaining universal.

Rae has been clear that her writing is "not for dudes" and "not for white people", but she included white writers in her staff for a well-rounded show. Her unqiue mix has led the show to greenlight for HBO for its third season this year, and critical acclaim is piling up.

The writer, who started her journey with the web series *Awkward Black Girl*, is determined that more diverse writing talent will lead to more representative and progressive TV. It is why she has launched an initiative with her prodco ColorCreative.TV to address the issue.

First Wave! partners Rae and Sky Vision to scout the latest diverse writing talent and give them development support to pitch to executives. The initiative recently announced its first winner, Katelyn Howes, who will produce a sci-fi scripted drama this year.

Rae said about the initiative: "With so many polarising views and rhetoric dominating the mainstream right now, it's crucial that stories and perspectives by people of colour, and women, are given an opportunity to be a part of the narrative."

This isn't simply an issue in Western territories. Ifa Shaniz AJ, a senior casting executive at Mediacorp in Singapore says there is a balance she has to strike in a culturally diverse population of Chinese, Malaysians, Indians and Eurasians.

"From my past experiences, I have been tasked to cast people from various backgrounds and cultures, but it all depends on the story line our story team has come up with," she says.

"I work closely with the story team to give feedback on the characters that we have on the story plots – mainly to ensure that all the characters are represented equally and to avoid character stereotypes." **TBI**

Insecure

Lupe's creative burst

Lupe Fiasco has created a prodco that looks to touch on cultural exchange, artificial intelligence and creativity. Kaltrina Bylykbashi speaks to the musician and business partner Bonnie Chan Woo

Looking at 2018, Lupe Fiasco, the rapper and record producer, is aiming to establish a forward-looking, global production company that incorporates his experiences as a creative entity, no matter the format.

Fiasco's new outfit, Studio SV, launched in October 2017 with partner Bonnie Chan Woo. It started from passion project *Beat N Path*, a new series which explores Fiasco's love of Kung-fu and Asian music.

"By recognising some of the interesting points of view and concepts that started to come out of *Beat N Path*, we decided to look at other potential productions, and other kinds of shows and themes," says Fiasco (real name Wasalu Muhammad Jaco). "We just started to come up with different ideas to build a studio around those ideas, of different cultures, global conversations, cultural exchange and different things like that."

The duo is now looking to produce three projects in 2018 and have a "heavy roster" in the space of five years. Chan Woo says the projects will be of different genres and formats distributed through a range of channels.

One of the latest developments saw the duo set an open call for comedy writers across social media. "We want to experiment with different ways of sourcing creativity around the world," says Chan Woo. "That was a success in a way because we got in touch with a lot of different people and got some good ideas, and we shortlisted some out of this concept we're working on for future projects."

Studio SV will be experimental in many aspects of its business. The outfit will have a 'cross-cultural' approach, ranging from the pair's partnership, the production team it is looking to hire and the products it creates.

The duo also say that they will be looking at new ways to reach audiences and market the titles, which may even see them create non-English-language originals. Technology will also be a focus for the prodco, with Fiasco stating his ambitions to keep Studio SV "dynamic and adaptable" to market changes.

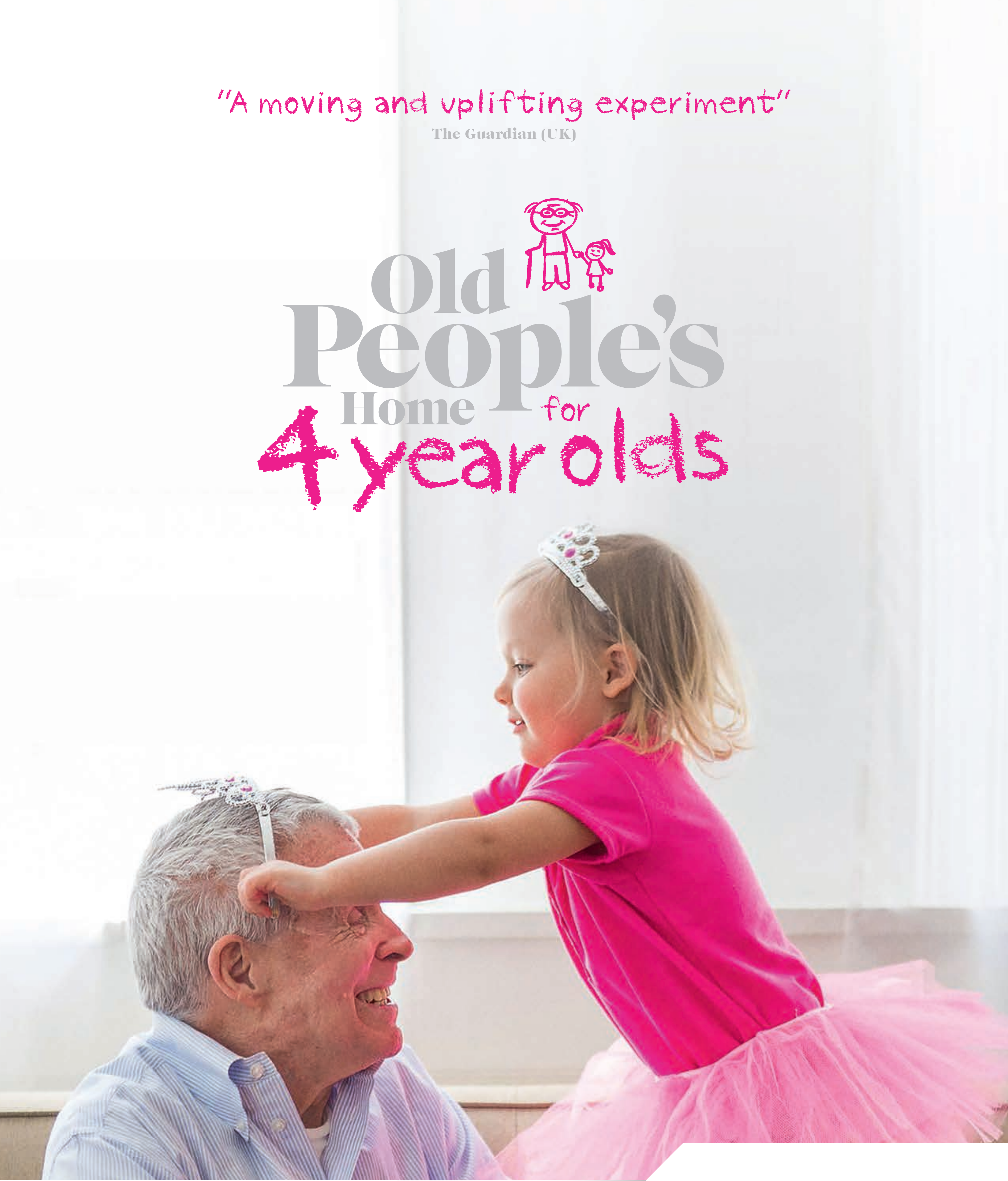
"We create content for traditional stuff happening now, but we also know there's this AI boom that's coming – there's this augmented reality space that's burgeoning, and we also want to be in that space and kind of design content around those new medias that are coming," he says.

This look to tech is why Fiasco, who was raised in the US city of Chicago, has moved to Asia and based the core studio in Hong Kong. "Asia is at the forefront of crossing culture and innovation," he adds. "It's the place to be right now in terms of content creation and access to production, to smart people and technology. There's no better place to be right now."

Fiasco tells TBI that the move into content is partly driven by a desire to keep close proximity to "what's new". Otherwise, he says the skills he has used for over 15 years as a musician are much the same.

"In content, you're using that same kind of creative mindset that I use into my music, or the curation I do for other people, or even some of the visual curation that I do for my work outside of music – it's just bringing all of that creative energy and creative spirit to this format," Fiasco explains.

How that creativity manifests will be of great interest to the business. **TBI**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The Guardian (UK)
Old People's Home for 4 year olds

Entertainment's Latin quarter

Well known for its storied scripted tradition, Latin American television is building a reputation as a source of unscripted formats, while global TV giants increasingly perceive this region as a core market in their international growth. Emiliano de Pablos reports.

Boom! Mexico

As is happening elsewhere, the TV business in Latin America is quickly changing. With TV drama production moving to OTT services, free-to-air TV operators are looking at why audiences should tune into their offer, which is generating new opportunities for non-scripted programming.

Though just hit entertainment format providers in the past, international TV giants are strengthening ties with local players in top Latin American TV markets, often establishing co-development and coproduction alliances.

Mexico, a vertex in the Latin American TV business leadership triangle along with Brazil and Argentina, has become a strategic country for key international companies in the non-scripted business.

Early this year, Keshet International, the global distribution and production arm of Israel's Keshet Media Group, set up Keshet MX, a Mexico City-based production hub to cover the Caribbean and Central America, to benefit from the strong TV synergies.

In November, Endemol Shine Latino, the Spanish-language division of Endemol Shine North America, joined forces with Boomdog – the coproducer of Mexico's *MasterChef*, aired by TV Azteca – to form Endemol Shine Boomdog, focused on developing and producing original scripted and unscripted content for the US Hispanic and Mexican TV markets.

Last summer, FremantleMedia Mexico tapped Argentina's Coty Cagliolo as managing director, responsible for developing and producing content for both Mexican and pan-regional TV markets. The company has produced Argentine flagship kitchen format *Cocineros* and highly rated reality show *México Tiene Talento* (*Mexico's Got Talent*), both for TV Azteca, plus the Mexican adaptation of *Family Feud* (*100 Mexicanos Dijeron*), for Televisa.

"Mexico is a very strategic market in many ways," says Kelly Wright, VP of distribution and new business at Keshet International. "Geographically, it straddles the line between Latin America and North America, it's an influencer – it really influences and sets the trends for the rest of Lat Am, and it also has the money to produce."

The whole Latin American TV market boasts further features that explain the present overriding interest in the region on the part of big international entertainment TV companies. "Lat Am is all about family and fun, and entertainment is usually just that," says Endemol Shine Latino president, Laurens Drillich. "The production level is high in most countries, for budgets that are still reasonable, and there is so much talent out there – on and behind the screen."

Endemol Shine's Latin American business "is alive and well", Drillich says, thanks in part to the expansion across the region of formats such as *Your Face Sounds Familiar*, *MasterChef*, *My Name Is* and *The Wall*.

"Unscripted is a very solid TV genre," says Laura Miñarro at Sweden's Eccho Rights, the global rights management company that is heading to NATPE with a new scripted reality pact with Germany's Constantin Entertainment. "I understand TV programmers perfectly: when they have an internationally tested show, success is practically guaranteed," she adds. "Innovating costs much more."

Red Arrow International and Spiral International recently sold dating format *Kiss Bang Love* to NBCUniversal International Networks Latin America, with a new adaptation airing on E! Entertainment hosted by Patricia Zavala. E! has also taken the rights to the US version of the show.

HBO Latin America, which has cemented its brand in original premium TV dramas such as *Epitafios* and *El Jardín de Bronce*, also dipped its toe into unscripted developments, with late-night talk show *Chumel con Chumel Torres*, produced in Mexico and distributed throughout Latin America and the US.

Last autumn, Viacom's Telefe and sister company MTV Latin America launched reality show *MTV Caniggia Libre* in several territories. Starring the twin son and daughter of former Argentine footballer Claudio Caniggia, the show will launch in Brazil in 2018.

Lat Am is all about family and fun, and entertainment is usually just that. Production levels are high, budgets are reasonable and there is lots of talent

Laurens Drillich, Endemol Shine

"The three top territories [in Latin America] lean towards formats that have proven success in the US and are less willing to go for riskier projects," says Bo Stehmeier, senior VP of global sales at Red Arrow International.

As in many other Latin countries, telenovelas and football continue to be local TV audiences' favourites in Brazil, Latin America's largest television market.

There is also a very strong presence of entertainment programmes, with local adaptations of *The Voice* and *MasterChef*, broadcast by Globo and Rede Bandeirantes' TV Band respectively, carving out a niche for themselves among the most watched TV shows of the year.A reality programme, SBT's *Esquadrao da Moda*, the Brazilian adaptation of BBC's *What Not to Wear*, is also a standout performer.

Pan-regional TV entertainment programmes are a common strategy among TV services operated by US TV players.

Following a strong tradition of reality programmes, MTV Latin America has also boarded *El Match Perfecto*, the Latin American adaptation of Lighthearted Entertainment's *Are You the One?*, and Mexican show *Acapulco Shore*, part of the *Jersey Shore* franchise canon.

In Colombia, All3Media International, backed by the recent success of the adaptations of *Kitchen Nightmares in Brazil* on Globo, Argentina (Telefe) and Chile (Chilevisión), has partnered with broadcaster RCN to launch a local version of *Undercover Boss*, a format that Globo has already covered in Brazil.

Despite – or maybe because of – the limited size of its own market, Argentina has traditionally played a leading role in the exportation of Latin American TV formats.

A few years ago, having taken, its first steps towards expansion across Latin America with *Cocineros*, Buenos Aires-based outfit Kapow has just signed a partnership deal with FremantleMedia, which strengthens Kapow's

Cocineros

Kiss Bang Love

position in Argentina and capabilities on an international basis.

The alliance allows Kapow – also producer of TV drama *Stockholm*, a pioneering Netflix pickup in Argentina – to access Fermantle's exclusive production rights and handle its entire entertainment formats' catalogue in the country. In turn, the global producer and distributor represents all entertainment formats created by Kapow outside Argentina.

A standout cooking TV property in the region, *Cocineros* was originally produced for public broadcaster TV Pública in Argentina. Chilevisión in Chile, TV Azteca and FremantleMedia in Mexico, Red Uno in Bolivia and Univision in the US have already adapted the format. The show follows passionate chefs who travel countries teaching and learning an array of recipes.

"We have a longstanding relationship with FremantleMedia Mexico, so it's very natural for us to work together for further consolidation," says Kapow co-founder Agustín Sacanell. "Undoubtedly, the distribution of FremantleMedia worldwide gives us great potential for growth beyond our region."

"*Cocineros* turns on local idiosyncrasies and each territory assumes it as its own," he adds. "It works on the pride of each nation for its customs, and food and cooking are very linked to that."

"Obviously, it is not a cooking recipe programme, because it has a daily runtime of two hours, so the format has small sections that overlap with games shows [families competing] and talent shows [it looks for the best mother or grandmother cooks, for example]."

On the back of the local adaptation of talent show *Rising Star* (*Elegidos*), in 2015 leading broadcaster Telefe inked a co-development deal with Keshet to create entertainment formats in Argentina such as *Heart Beats*, an ambitious hybrid that combines talent, dating and reality genres, which is currently at the budgeting stage.

"With *Heart Beats*, we really wanted to bring some of the romance and drama of the telenovela world into reality, and whereas dating doesn't necessarily work in Argentina, a combination of dating, reality and talent might," says Keshet's Wright. "What we're doing is looking for the next power couple: the next Beyoncé and Jay Z, the next Sonny and Cher."

Keshet also has a co-development deal for non-scripted programming with broadcaster Mega in Chile, and they are currently working on three different projects, Wright adds: "There has been a habit of buying non-scripted in Lat Am, but there is now a desire to start to develop local non-scripted original formats.

"We are helping to do that in key territories like Chile and Argentina, and we are very interested in taking original ideas from these territories and looking at whether or not they can sell into Lat Am and if they're relevant to the rest of the world."

Keshet's other moves across the region also include a deal unveiled in November with Brazilian broadcaster Record TV for quiz show *Contacts* and hidden camera format *Deal With It!*.

The company also aims to plant flags in markets such as Ecuador and Bolivia, making it one of many players vying for control of an increasingly lucrative and creative market. **TBI**


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LAST WORD

IAIN MCDONALD

Tech is game for TV takeover

With the arrival of US tech giants onto the scene, television has undergone a radical transformation over the last decade – a transformation still far from being complete. Whether it's Google-owned YouTube, Facebook Watch, Amazon Prime Video, Twitter or Netflix, these tech companies are taking on an ever more prominent role in broadcasting.

The likes of Netflix and Amazon successfully used long-form drama as a Trojan horse to enter the market and the Silicon Valley firms now have their sights set on sports broadcasting.

There are numerous examples of tech firms entering the live sports broadcasting market, perhaps the most prominent being Amazon's US$50 million deal for the streaming rights of Thursday night NFL games. Other examples include Twitter's arrangements to broadcast US PGA golf and YouTube streaming the 2016-17 UEFA Champions League final. The scale and volume of these deals will only increase.

Many experts, including Ed Woodward, vice chairman of Manchester United, expect to the likes of Amazon enter the bidding in the next Premier League rights auction. It remains to be seen whether tech firms will swoop in on the crown jewels – exclusive live broadcast rights.

However, there are inherent differences between the sports rights market and the traditional content carried by platforms such as Amazon Prime and Netflix, which leave question marks over whether the Silicon Valley giants will bid on the marquee packages.

Online broadcasters successfully disrupted the market thanks largely to high-value, long form drama that created shared experiences, permeated mainstream popular culture and was watched by millions – creating 'water-cooler moments'. Examples of such programmes include *Breaking Bad* and *Stranger Things*.

A key feature of this strategy is that the content is 'original' and the rights are owned by the platform, removing friction in terms of distributing the content to a global audience. This, however, is not possible with the other principal generator of water-cooler moments – live sport. In sport, rights are sold market by market – a fundamental feature of sports rights holders' broadcast sales strategy.

When viewed through this prism, there is huge speculation focused on how much financial grunt the tech giants are prepared to unleash on the sports scene.

In reality, the track record of the tech behemoths in sports broadcasting has been a small ripple compared with the US$4.2 billion Sky paid in the last Premier League auction in the UK. Deals have been focussed on the acquisition of less significant digital streaming rights.

To date, there has yet to be an all-out war between new and traditional broadcasters. This has been good news from a licensing perspective, as rights packages can now be sold for both live broadcast and digital streaming.

There are signs, however, that Silicon Valley players are beginning to step up to the plate. Amazon recently outbid Sky for the exclusive live rights to the ATP Tour tennis and Facebook unsuccessfully bid US$610 million over five years to broadcast the Indian Premier League cricket. Indeed, Mark Zuckerberg has stated that in the future sport will become key to Facebook Watch content.

The implications of this change on broadcasting are for the moment unknown, but the prevailing consensus in the industry is that even the largest tech firms might not wish to compete for marque live broadcasting rights.

For the time being, exclusive live sport remains more valuable for Sky or BT than Amazon or Netflix – the return on investment is significant for traditional multimedia and telecommunications companies. For example, in the UK, BT and Sky will use Premier League rights to attract customers to a wide range of services, cross-subsidising loss-making rights packages by selling more broadband, television and mobile bundles.

There is clearly a growing tension over sports broadcasting between new market entrants and traditional broadcasters, but we are still a long way off the hyper competitive context of long-form drama.

If the tech firms are able to conquer the arena of sports broadcasting in the same way, then the market will have been disrupted to an even greater level.

Drama has given us insight into what the future of television may look like. The fate of live sports could give us a definitive answer. **TBI**

There is clearly a growing tension over sports broadcasting between new market entrants and traditional networks, but we are still a long way off the hyper-competitive context of long-form drama. Scripted provides insight into the future of TV, but sports may provide the answer

#1 DRAMA WORLDWIDE
#1 U.S.*
#1 AUSTRALIA*
#1 CANADA*
#1 U.K.*
#1 KOREA*
#1 SPAIN*
"★★★★"
– DAILY MAIL (U.K.)
"A POWERHOUSE PERFORMER"
– MEDIAWEEK (AUSTRALIA)
"EXCELLENT"
– VULTURE
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– TV INSIDER
"Drama with HEART AND HOPE"
– NEWSDAY
the Good Doctor
*Source: Total Audience (000)s in each market; U.S. = #1 TV Drama; Nielsen Media Research, Live+7, Sept 25th - Nov 10th. Canada = #1 TV Drama; Numeris, Live +7, Sept 25th - Nov 10th. Australia = #1 TV Drama; OzTAM, Metro, Consolidated 7, Jan 1st - Nov 7th. U.K. = #1 program on Sky Living; BARB / Kantar Media / TechEdge, Live+VOSDAL+7, Mar 15th - Nov 6th. Spain = #1 program on AXN; Kantar Media / TechEdge, Live+VOSDAL+7, May 31st '16 - Nov 7th. Korea = #1 Primetime Series on AXN; Nielsen, National, Primetime = 18:00-26:00, Overnight, Jan 1st - Nov 2nd.
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